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Define Financial CEO Taylor Schulte, CFP® to Speak at FPA Annual Conference on Sept. 26, 2015

San Diego Financial Expert to Provide Advice on Building a NextGen Practice at Nation's Largest CFP® Gathering in Boston, Mass.



SAN DIEGO, Sept. 24, 2015—[Define Financial](#), a San Diego-based commission-free financial planning firm, announced today Founder and CEO Taylor Schulte, CFP® has been selected to speak at the 2015 [FPA Annual Conference](#), held in Boston, Mass., Sept. 26-Sept. 28. Schulte will discuss strategies for building a successful NextGen practice and ways of catering to a younger demographic.

The FPA Annual Conference is the largest gathering of CFP® professionals in the U.S. Dedicated to financial planning, the conference draws more than 2,000 financial planning professionals from around the world and provides attendees the ability to connect with peers, learn about industry trends and gain new practice management resources.

“This conference is one of the best annual professional development and networking events in our industry,” said Taylor Schulte, CFP®. “It’s truly an honor to have been selected as a speaker and have the opportunity to share our story. I am looking forward to presenting and collaborating with other great professionals attending this year.”

Schulte will be presenting at the NextGen Mini-talks session on Saturday, Sept. 26. He will discuss ways Define Financial has strategically catered to younger successful professionals and share best practices for building a firm for the future. Schulte was the only San Diego-based financial planner selected to speak at the session.

For more information on the 2015 FPA Annual Conference, visit: www.fpa-be.org.

About Taylor Schulte, CFP®

Taylor Schulte, CFP® is founder and CEO of [Define Financial](#), responsible for company’s vision, strategy and execution. Schulte is passionate about helping clients create successful financial plans, accumulate wealth and plan for retirement. While he works with a range of individuals and small businesses, Schulte has a keen understanding of young professionals’ financial needs and infuses industry-leading technology into his practice to optimize client results and experience.

Prior to founding Define Financial in early 2014, Schulte served as a financial advisor at Morgan Stanley and launched the San Diego operations for Beverly Hills Wealth Management, where he spent two years growing his client base.

Schulte was recently honored with the 2015 [Five Star Wealth Manager](#) Award, a recognition limited to less than five percent of San Diego wealth managers, and was selected as one of San Diego's '[40 Under 40](#)' professionals and the 2015 [Metro Mover](#). He has been featured in a number of national and local publications, including [The Wall Street Journal](#), [Kiplinger](#), [Main Street](#), [Financial Planning](#), [AdviceIQ](#) and [San Diego Magazine](#). He is also a regular contributor to [San Diego Downtown News](#).

Schulte holds a Bachelor of Science degree in Business Management from the University of Arizona and an Executive Financial Planner Advanced Certificate from San Diego State University.

When he isn't busy developing customized financial plans to ensure his clients' success, Schulte enjoys traveling with his wife, playing golf and discovering new restaurants in his hometown of San Diego.